



INSTALLATION AND CONFIGURATION OF SUCCESS™ ver. 4.X

↔ LANTDIV SUCCESS™ HELP LINE-- (757) 322-4331 (Internet barnesml@efdlant.navfac.navy.mil)

NOTE: Version 4 of SUCCESS™ is a 32-bit software program. Hardware requirements for this program may exceed your equipment; if unsure, contact US Cost or the Help Line as given above.

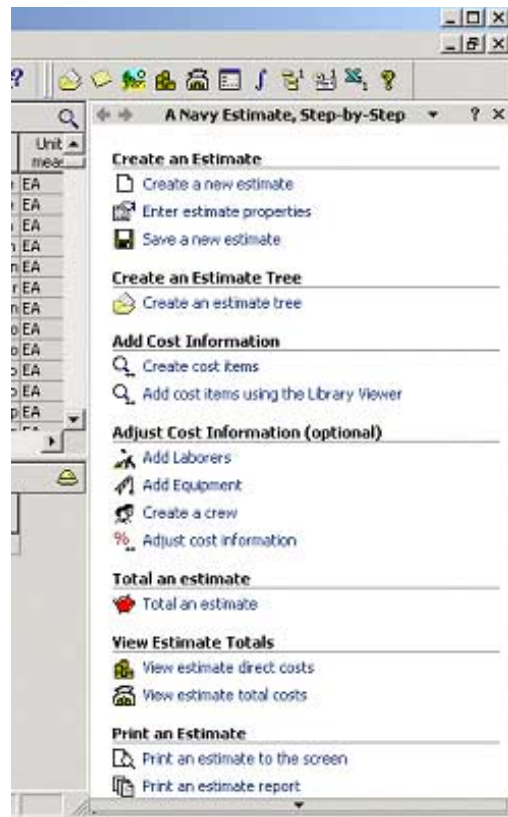
HOW TO OBTAIN THE LATEST SUCCESS™ VERSION:

There are two methods of obtaining the latest version of Success™ for NAVFAC cost estimating:

- **INTERNET**—The NAVFAC Cost Engineering website is now active, and allows download of the Success™ software and updates directly from the internet at <http://www.uscost.net/CostEngineering/>
- **CD-ROM**—SUCCESS™ is still carried on the Construction Criteria Base (CCB) CD-ROM; however, there is now a subscription charge required. For further information, visit the site <https://www.ccb.org/ccbsubscribe/Subsmain.asp>.

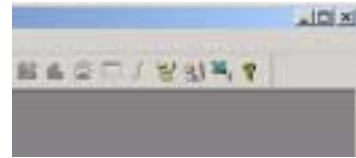
NEW TO SUCCESS

SUCCESS™ now includes a feature that is called at “Task Pane” (see detail at right). This new feature is an “interactive” way of going through the steps of developing an estimate. It is strongly suggested that the step-by-step instructions be followed, at least once, by all users to familiarize themselves with some of the lesser known features (and new developments) of SUCCESS™.



NEW ICONS

The NAVFAC version of Success™ now includes four toolbar icons tailored specifically for certain NAVFAC requirements. Double-clicking the first opens the included NAVFAC WBS Dictionary. Opening the second creates a Blank Bid Format in MS Excel. The third takes the tree and associated levels, including all detail line items, and develops a MS Excel spreadsheet including markups. The fourth is a Help file tailored for NAVFAC estimating.



INSTALLING THE SOFTWARE

Follow the applicable directions for installation, depending upon whether you have the CD or Internet (electronic) version. Help with installation of the CD version may be obtained directly from NIBS by calling (877) 222-5667. Assistance with the electronic version may be obtained from US Cost at (770) 481-1600.

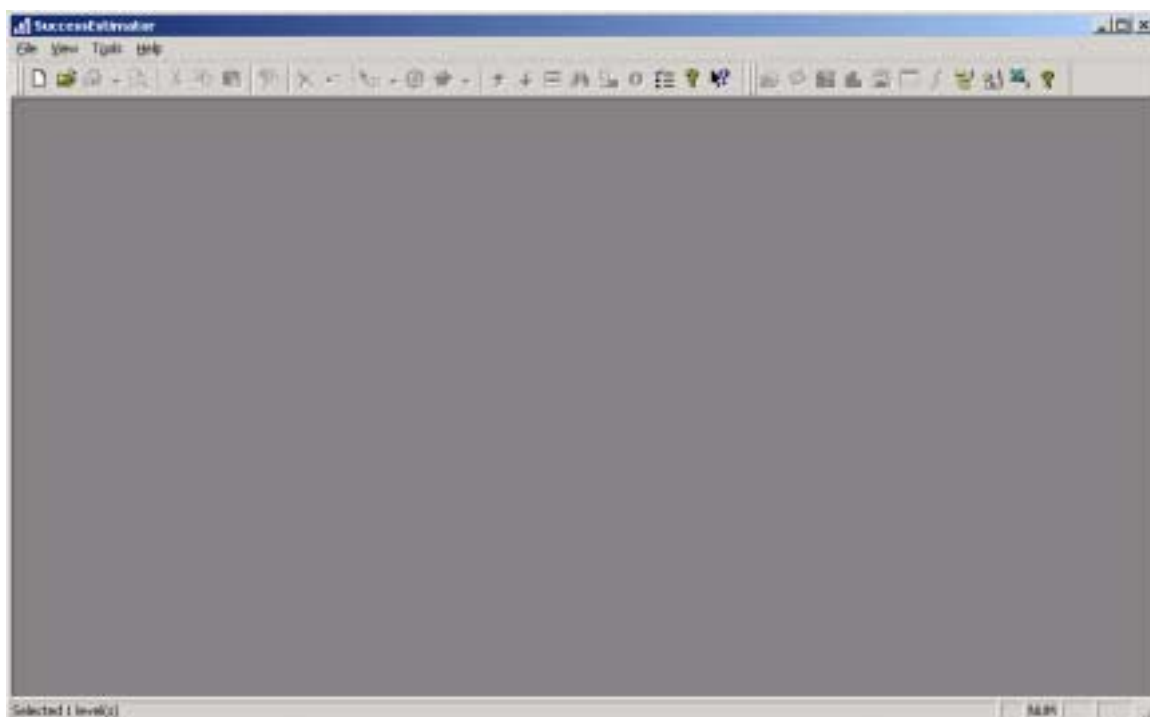
NOTE: The supplied databases, English and Metric “Commercial Unit Price Books”, must be installed as a separate step under both methods.

Following download of the software from the website, double-click the file to initiate installation. You will be prompted for a password to install; this must be obtained from USCost. To obtain a password, contact USCost Technical Assistance at techsupport@uscost.com. You will be asked to provide your contract number with DOD (Navy, Army, Air Force) on company letterhead, and the name of a contact person in the company. In return, you will receive a password which will allow multiple installations of the software with no time restrictions.

You do not need to purchase the program in order to use it; DOD has a site license for it. However, this license is extended to DOD contractors with the restriction that the program be used ONLY for DOD work. The CUPB database, likewise, is restricted to DOD users.

OPENING SUCCESS™

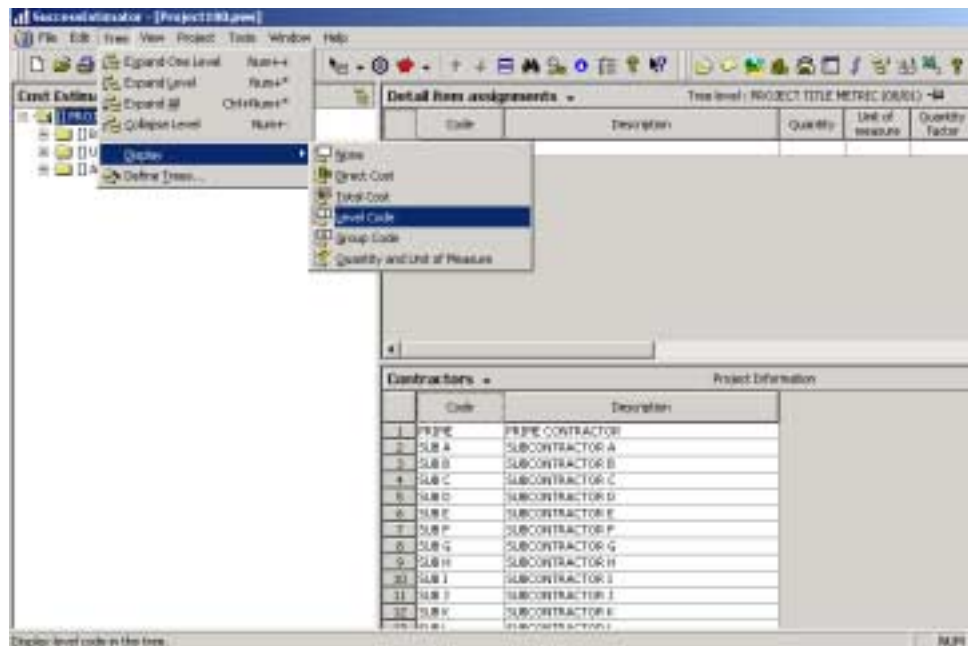
1. Open the SUCCESS™ software by double clicking on the SUCCESS™ icon (it looks like a skyscraper). Your screen will resemble the following:



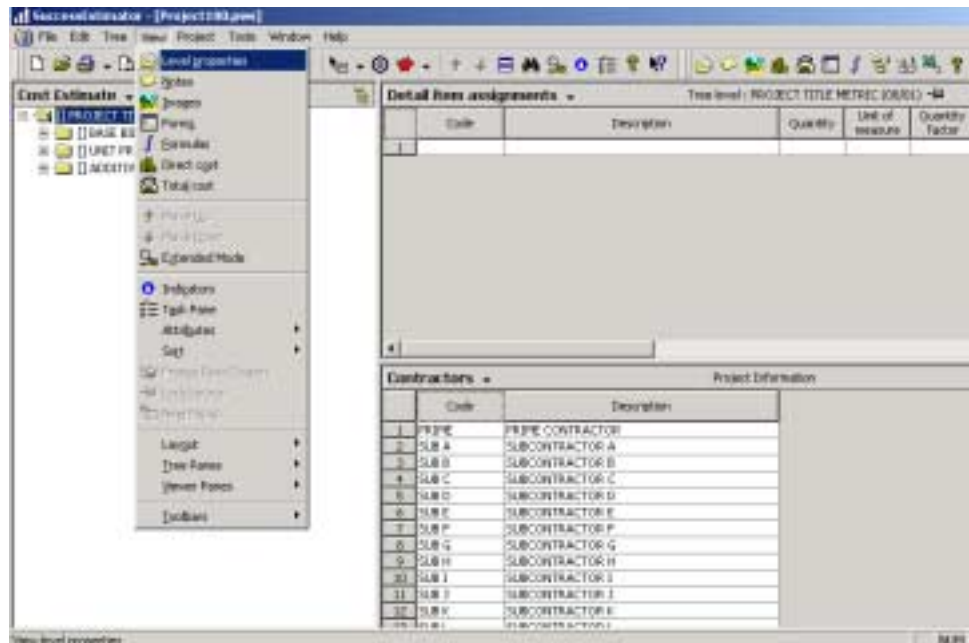
2. Templates have been provided which contain the required Work Breakdown Structure (WBS) tree; Davis Bacon labor rates for the Norfolk area, pre-formatted contractors, and various preset user options. To start your estimate with the Norfolk area template, click once on the toolbar icon which resembles a blank piece of paper, and select the most current LDIV template.
3. Give the "Project1.pws" (estimate template) a name; do this by clicking "File—Save As", typing the name as prompted, and clicking "OK". *It is suggested that you create a subdirectory called "Success4" or similar at C:\My Documents, and save all Success ver. 4.x files here.*
4. To expand the entire template "tree", click "Tree—Expand All", or use the hot key ["asterisk", (*)].

To view level codes, cost, or quantity & unit of measure in the project tree, select "Tree—Display" and select your choice. It is suggested that level code be chosen, as shown below.

Project tree with Level Code display



5. To rename the template tree to match your project, click on the uppermost level of the tree: Select "View--Level Properties"



The following “Level Properties Popup” appears

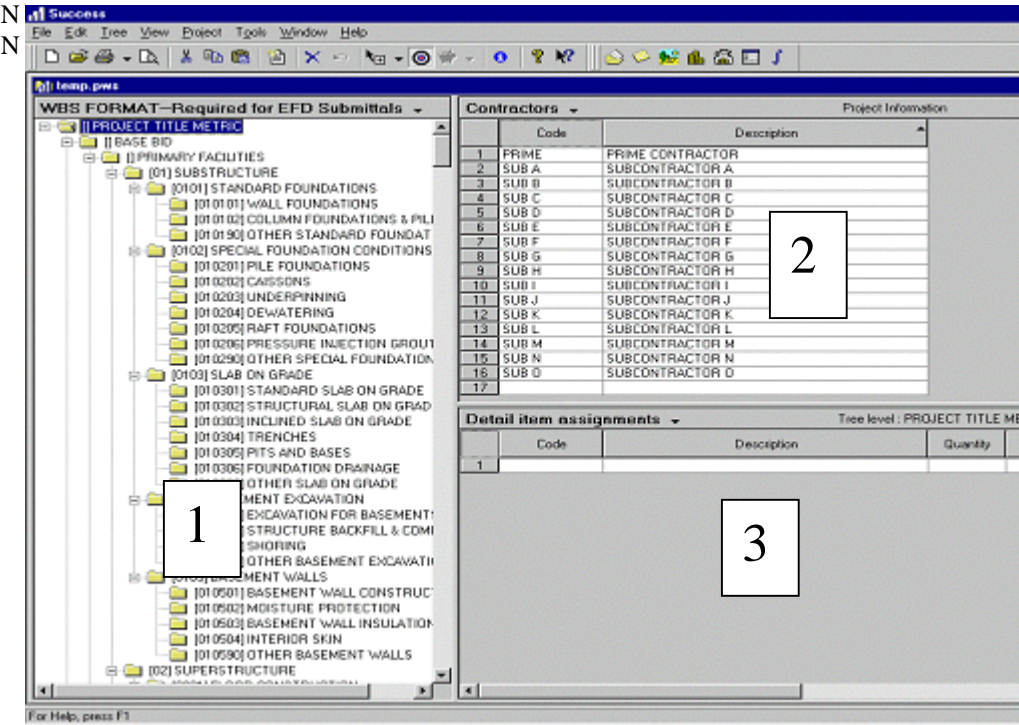
Highlight the text in the “Description” field of the “Level Properties Popup”, and type in the new estimate name. Click on “Save” (the floppy disk icon) or hit “Enter” to save the new estimate tree name.

SETTING UP REPORTS

There is no need to “set up” the reports in version 4.x of SUCCESS™. All configuration has been performed for you by the software setup.

CHANGING DISPLAYED VIEWERS

The default installation of SUCCESS™ produces a screen similar to the one depicted below:



Area #1 is called the “Tree Pane”, and is a graphical representation of the project structure;

Areas 2 and 3 are called “Viewer Panes”. Version 4.2x of Success™ allows up to 5 tree panes and 5 viewer panes to be displayed at one time.

To change what information is displayed in the viewer panes, click on the pull down menu in the upper left of each viewer pane, and select the desired topic.



Detail Items: A complete listing of every detail line item, including blanks, in the estimate.

Labor: Labor resources and base rates available in the estimate; all may not be in use.

Equipment: Equipment resources & basic hourly rates in the estimate; all may not be in use.

Crews: Crew resources and rates in the estimate; all may not be in use.

Crew adjustments: Location of foreman and apprentice adjustments.

Materials: Lists material MODIFIERS carried with your estimate.

Contractors: Lists all contractors available in the estimate

ASSIGNMENTS

Detail item assignments: Lists detail line items as assigned to estimate tree levels.

Crew member assignments: If Crews viewer is open & crew highlighted, lists crew member & rates.

Markups assignments: If Contractor viewer is open, used to add/modify Contractor markup rates.

You may wish to turn the panes on or off as best suits your computer screen, number of files open, and personal preference. To do so, select “Tools—Customize—Layout”, and choose your option.

THE CUPB DATABASE

The CUPB database may be obtained from the CCB-CD or the NAVFAC website as indicated above for Success™; it is the preferred pricing source for all Navy projects. Although other databases are available for use with SUCCESS™, including various R.S. Means databases, many of the Navy reports were developed with the CUPB as the format guide, especially in the area of Construction Specifications Institute (CSI) codes.

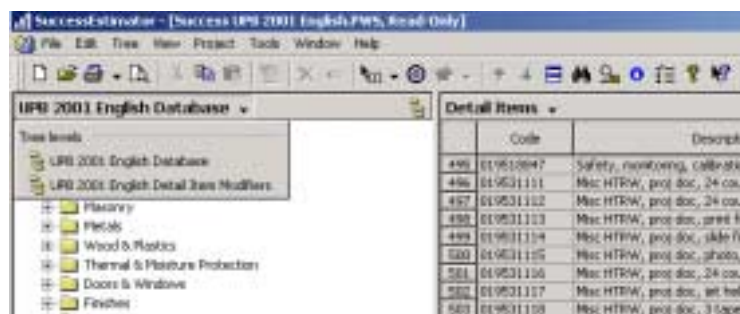
ADJUSTMENTS TO THE DATABASE: The CUPB database has been developed by R.S. Means under the oversight of the Tri-Services, using the U.S. Army Corps of Engineers Unit Price Book as the basis.

Labor rates are based on a 30 city average, **but are automatically adjusted for you when the line item is brought into your estimate (assuming you started with the provided LANTDIV WBS templates).**

Material unit pricing is a national average, and was typically developed using a minimum of three quotations. Where three quotes were not available, a “reasonable” unit price was used. **The material unit pricing is NOT adjusted as it comes into the template; estimating judgement is suggested,** but the R.S. Means material index for Norfolk is 0.98. This index may be applied to material pricing thru the use of a “contractor markup”, which will be discussed later.

LINE ITEM MODIFIERS

The CUPB “Tree” comes with detail line items in one tree view, and the modifiers in a second.



1. The line items that are Detail Item Modifiers include productivity and material adjustment modifier information that is intended to be copied to an existing Detail Item (Assignment) to be modified.
2. In order to use the modifier information on an existing Detail Item (Assignment), copy the information from the "Productivity" field and the "Material Code" field of the Detail Item Modifier to the same fields of the Detail Item (Assignment) to be modified. (Note: In order to use the productivity field "Compute Hours" must be checked in the "Totals" Folder of "Options" from the Tools Menu.)
3. The value in the "Productivity" field of the Detail Item Modifier, (after copying to the Detail Item Assignment) will increase or decrease the productivity of the Detail Item (Assignment). A value of "1.00" in the "Productivity" field indicates there is no change in productivity and the value should not be copied from the Detail Item Modifier to the Detail Item (Assignment).
4. The assigned code in the "Modifier" field of the Detail Item Modifier, (after copying or assigning to the Detail Item) will automatically add a Material Modifier to the Detail Item. The Material Modifier may either increase or decrease the current Detail Item material unit cost by an amount or a percent. The adjustment to the material unit cost is displayed in the "Material adjustment" field of the Detail Item (Assignment). The information for each Material Modifier is displayed in the Material Viewer and associated Markup Assignments Viewer.
5. The description of the Detail Item Modifier may be copied as a note to the Detail Item (Assignment) that was modified to designate it includes a Detail Item Modifier.

ADDING “END ITEMS” (DETAIL LINE ITEMS) TO YOUR ESTIMATE

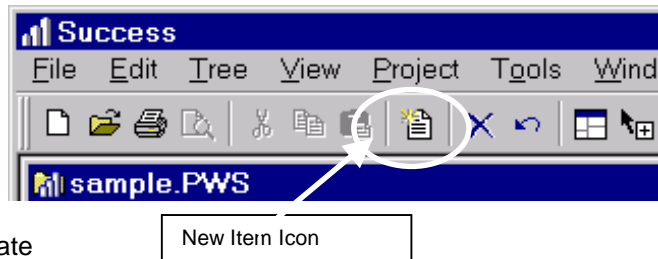
1. Open the CUPB database; expand or collapse the tree to reflect the areas you will be accessing in producing your estimate. There are two viewer options which allow a user to see line items in an estimate, Detail Items and Detail Item Assignments (“DIA”). The “Detail items” viewer can be thought of as a pricing resource; it lists all the line items in your estimate, but without quantity. If you use the same line item over and over, it can be brought into the estimate tree from the Detail items viewer. The DIA will show what items have been “assigned” (attached to) an estimate level, if that level has been selected (highlighted) in the tree view. Use of the Detail Item pane while using the CUPB is not recommended, as it will list all 22,000 items in a continuous listing.

To add a line item to your estimate, have the DIA pane in your CUPB open, locate and highlight the line item desired, hold the left mouse button down, and “drag” the item to your estimate. You may “assign” the line item either to the tree in the tree pane, or to the tree in the DIA pane of the estimate. Placement of the line item in the Detail Item viewer (versus the DIA viewer) does NOT “assign” the

item to your estimate, but rather only stores the line item with the estimate. **The item must be “assigned”** (attached to a tree level) and quantified before it can add to the cost of the estimate.

To “drag and drop” MULTIPLE items from the database, holding the “Ctrl” key down while clicking with the mouse will select non-consecutive items, while clicking and holding the left mouse button down while moving the pointer down the list will select consecutive items.

Alternatively, add a new detail line item (click the “new item” icon), and with the database open, type a code directly into the detail item browser which corresponds to a line in that database. Hold down “F4”, and Success will retrieve the item into your estimate (this does not work after you have moved off of the code cell the first time).



Complying with these simple rules in assigning line items to the Navy WBS estimate tree will alleviate many of the most common reporting errors. These rules are:

- 1) Always assign line items to the second numbered level of the tree, OR LOWER.

Assignment of line items at the second numbered WBS level is considered to be a budget level estimate (35% AND BELOW), while Final estimates should always have items assigned to the THIRD level or lower.



- 2) **DO NOT** assign line items to two levels of the same tree (e.g., 0101 and 010101 in this example).

- 2) When creating user items, be sure to use a CSI compatible code, especially as concerns the first five digits of the code entry; this affects the two CSI reports.

MOVING LEVELS IN THE TREE

From time to time, you may encounter situations where the tree structure has become ordered such that the WBS codes are not sequential. BEING CAREFUL NOT TO DESTROY THE WBS NUMBERING SEQUENCE, rearrange the tree as follows:

- Select “View—Toolbars—Customize” from the menu.

- Find the two icons resembling arrows, see right-----



- Drag these two icons to the toolbar at the top, and drop them in the toolbar.
- Highlight the level you want to move, and click the appropriate arrow.

MOVING DETAIL LINE ITEMS IN RELATION TO OTHER DETAIL LINE ITEMS

- Highlight the line item you wish to move.
- Click on the appropriate arrow icon on the toolbar as described above.

SORTING DETAIL LINE ITEMS

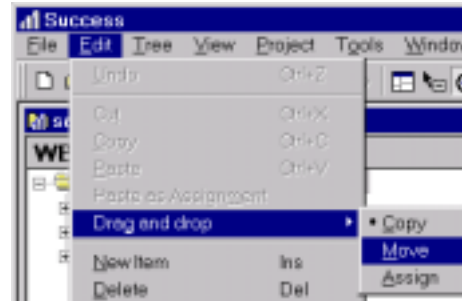
- Highlight (select) the column in the DIA viewer that you wish to use as the sort column.
- Right mouse click, and select “Sort”.
- Choose the appropriate selection. Double clicking on the column will sort ascending or descending.

This method of sorting is on screen only. To have reports printed with the sorting intact:

- Select “Tools—Options”, choose the Reports tab, and check “Use Category’s sort order for reports and exports”.

MOUSE FUNCTIONS (Copy, Move, Assign)

SUCCESS™ 4.x allows three different modes of “Drag and drop”; Copy, Move, or Assign. To set the option, click “Edit—Drag and drop” and select your choice. Briefly, Copy will copy a detail item or tree level to a new location, Move will move it from the original location to a new location. “Assign” is typically used to “attach” a detail line item from the Detail Item listing (in your estimate) to a tree level in your estimate. This method is especially helpful if a line item, say, concrete, is used in many places throughout the estimate. Changing the material price in one item changes the material price in all similar assigned items.



This mouse function may also be set using the “Drag and Drop Modes” icon.

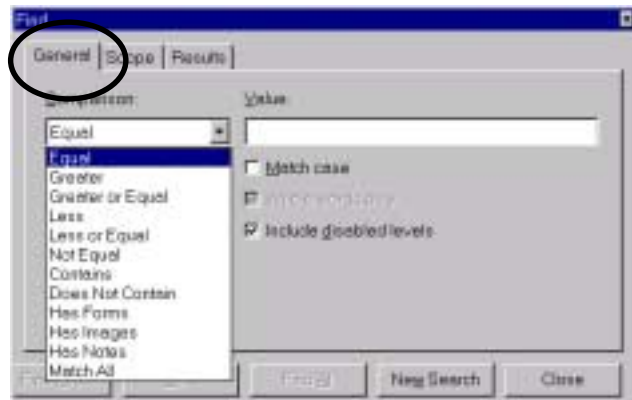
Drag and Drop Modes
Icon



FIND AND REPLACE FUNCTIONS

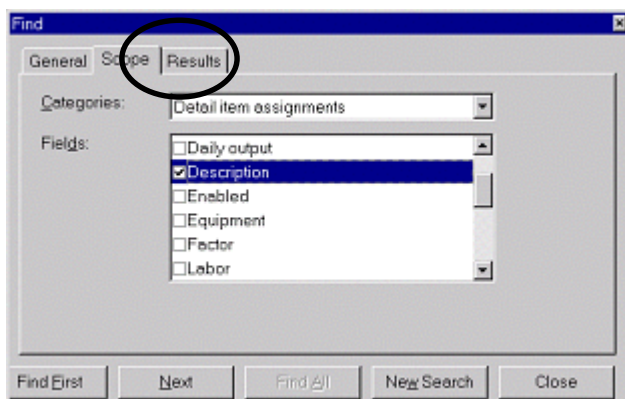
To locate a topic heading or detail line item in the CUPB, go to “Edit—Find” in the toolbar.

(The following instruction assumes you are locating text in a line detail item description in the CUPB. Modify as necessary for your needs.)

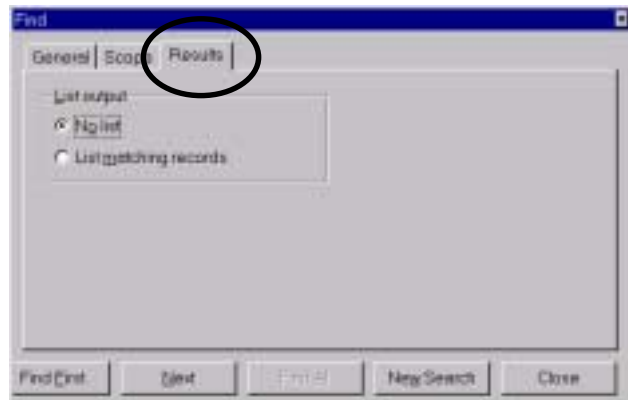


In the “General” tab, click once on the “Comparison” down arrow, and select “Contains”. Type the word to be searched for in the “Value” bar.

In the “Scope” tab, select “Detail item assignments” under “Categories”, and “Description” under “Fields”.



In the “Results” tab, choose your preferred method of indicating a “match”; listing records allows you to choose from a number of matching line items.



The “Replace” function works in a similar manner to the Find function; be sure to use “Contains” as a comparison.

APPLYING MARKUPS TO YOUR ESTIMATE

There are numerous ways to “mark up” a SUCCESS™ estimate; **not all of them are acceptable for Navy projects** for various reasons. Some methods are very difficult to report (for “audit trail” purposes), others do not allow specific line items to be marked up while others remain unburdened. Therefore, it has been determined that the following method, **and ONLY the following method**, will be used at this time to add markups (including contingency, escalation, taxes, and OHP) to your estimate.

- **CONTRACTOR MARKUPS**

Contractors and the commonly used markups are preloaded in the two templates (WbsEnglishNorfolkRates.pws and WbsMetricNorfolkRates.pws). View the available contractors by selecting the “Contractors” pane.

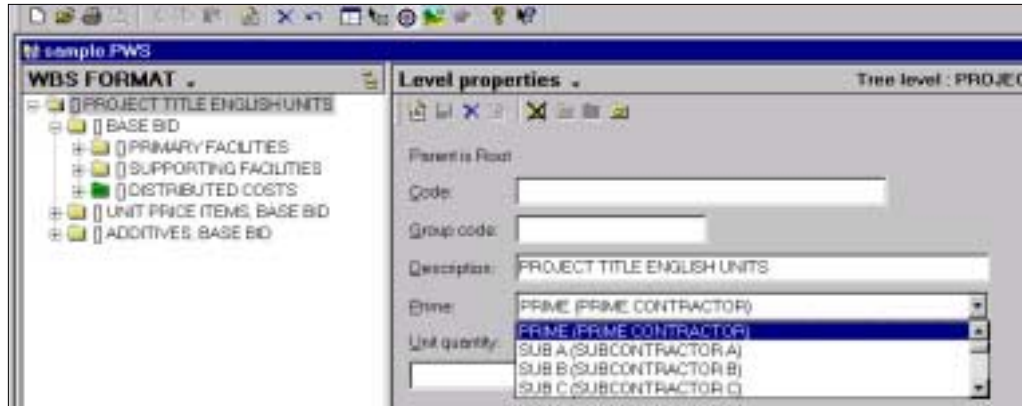
Contractors		
	Code	Description
1	PRIME	PRIME CONTRACTOR
2	SUB A	SUBCONTRACTOR A
3	SUB B	SUBCONTRACTOR B
4	SUB C	SUBCONTRACTOR C
5	SUB D	SUBCONTRACTOR D
6	SUB E	SUBCONTRACTOR E

- To view, modify, or add to the preloaded markup for a Contractor, with the “Markups assignments” pane open, highlight a Contractor (in this case, “Prime”) in the Contractor’s pane. You will see the following:

Markup assignments		Contractor : PRIME CONTRACTOR					
	Description	Amount	Percent	Labor	Equipment	Material	Unit Cost (Sub Quote)
1	TAXES ON MATERIAL	0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2	TAXES AND INSURANCE ON LABOR	0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	TAXES ON EQUIPMENT	0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	DESIGN CONTINGENCIES	0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5	PRIME OVERHEAD	0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
6	PRIME PROFIT	0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
7	BOND	0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
8	MISCELLANEOUS TAXES	0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
9	COC	0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
10	ESCALATION	0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
11			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

If you started with either of the Norfolk templates, or from a project which itself came from these templates, in order to add or modify Prime markups to your estimate, merely add appropriate percentage in the “Amount” column of the markups Viewer (**do not add dollars**).

As indicated here, the Prime is pre-loaded to the templates at the “Project” (uppermost) level.



Therefore, the Prime has been “applied” to the level, and any markups available for the Prime will be applied to all levels and line items below it.

• SUBCONTRACTOR MARKUPS

Subcontractor markups are assigned to detail line items in the DIA pane, and are intended to account for the Prime’s markup burden on Subcontractor work. Unlike the old UPB previously in use, the

CUPB does not have subs preassigned to detail line items. To assign subs to a line item, click on the “Contractor” cell of the appropriate line item

Tree level: WALL FOUNDATIONS					
Description	Quantity	Unit of measure	Contractor	Resource	Pr
series, chamfer strip, PVC, 1/2" wide w/leg	1.00	CLF		ACARCP1	

(this is true for either the DIA viewer or the Detail item viewer, but is typically done only at the DIA) and the Contractor’s’ pane will open. Select a sub with a mouse click, and drag it to the Contractor cell. Those markups assigned to that Sub will now be applied to the line item.

If the “Contractor” cell for the detail line item is left blank, no Sub markup will be applied to it, but as the Prime has been assigned to the Project level, it will be marked up for the Prime. Subcontractor markups applied to individual line items are **IN ADDITION TO** Prime markups.

You may decide to set up your own template with standard markups for each contractor. Once entered, these may be copied into other projects as long as the contractor does not already exist in that estimate.

- **DO NOT apply any contractor as its own sub**; in theory, this would never happen, and it results in redundant markups in your estimate.

CUSTOMIZING PROPERTIES OF YOUR ESTIMATE

To view Project Properties, select “File—Properties, and click on the “Custom” tab.



- **DO NOT** use the “Summary” properties; these are Microsoft standards, and are not used in the Navfac reports.

IF CUSTOM PROPERTIES DO NOT RESEMBLE THIS SCREEN, CLOSE the viewer.

- 1) If the “Properties” area was blank, select “Tools—Import”, choose “4.3 Navy Properties.dbf”, and click once on “Import”.
- 2) If the Properties had information available, but had different entries (for example, if a 3.0 project is imported into 4.x, it will bring with it the 3.0 properties which are NOT the same as the 4.x properties), click on “File—New”, select a Navy WBS template, delete the new WBS estimate tree, drag your entire estimate tree into the blank “estimate”, and close your pre-existing estimate.

Name	Value	Type	Form ID
AE_NAME	AE/CONSULTAN..	Text	
BID_DATE	FEBRUARY, 1995	Text	
CAT_CODE	101-11	Text	
CONTRACT	N62470-99-8-9999	Text	
CONVERSION	0.00	Number	
CURRENCY	DOLLARS	Text	
DATABASE	CUPB97 ENGLISH	Text	
DATE_EST	01/01/99	Text	
EST_NAME	FILE (24 CHARAC..	Text	
EST_PHASE	FINAL	Text	
ESTIMATOR	Corey Nelson	Text	

- DO NOT delete any of these properties, or the reports will not print.
- DO NOT modify the “field name” column, or the reports will not print.

To modify property “values”, click once on the property “Name” (e.g. AE_NAME), then type the new entry in the “Value Bar”.

Value Bar

NOTE: Entries are limited to the number of characters for that item as indicated in the “Tools—Customize—Fields” tab. These limits are set based on the Navy reports, and cannot be changed.

After changing a Property value, click on “Modify”, and select the next Property name to change, continuing in this manner until all properties are tailored to your estimate.

<u>PROPERTY NAME</u>	<u>DEFAULT PROPERTY VALUE</u>	<u>DESCRIPTION</u>
AE_NAME	AE/CONSULTANT???	Company Name of Architect/Consultant preparing Est.
BID_DATE	FEBRUARY, 2000	Projected Bid Date for Project
CAT_CODE	101-11	Category Code for facility
CONTRACT	N62470-99-B-9999	CONSTRUCTION Contract Number (NOT AE number)
CONVERSION	0.00	0.00 is default, contact EFD prior to changing
CURRENCY	DOLLARS	DOLLARS is default; contact EFD prior to changing
DATABASE	CUPB99 ENGLISH	CUPB97 ENGLISH,CUPB97 METRIC,CUPB99 ENGLISH,CUPB99 METRIC
DATE_EST	06/01/99	Effective Pricing Date for Estimate
EST_PHASE	FINAL	Phase of Cost Estimate
ESTIMATOR	Imex Spensive	Name of Estimator
FUNDS_AUTH	150.00	Construction Funds available for project
P_NO	P-123	Project Number; Milcon (1391) project Number
PRINT_NOTE	Y	Enables certain Report note fields
PROJ_SITE	Ft. Knox, Kentucky	Location of Project
PROJ_SIZE	1.00	Project Size per unit Quantity
PROJ_UM	LS	Unit of Measure; m2, BBL, Units, etc
PROJECT	SAMPLE SUCCESS	Project Title
SOFTMETRIC	N	Default is "No"; use to change Imperial to Metric
UIC	N62863	Unit Installation Code; N62470 (Norfolk)etc. Contact PM

NAVFAC REPORTS

At present, there are 13 Navfac reports available; each one has a specific purpose, and needs to be used only as required by each EFD. In general, only the following reports need be submitted:

- **ONE of the three summary reports (A,B,C);** choose the one which best represents the project's complexity. Larger projects are usually best summarized using "A—Summary Report", while smaller projects are best depicted using "C—Assembly Category Report".
- **Reports "D—Markup Report", "E—Detail Report Unburdened", and Report "F—Error Report" should ALWAYS be submitted.**
- Report "F—Error Report" is used as a way of locating "errors" in how the estimate is assembled, and to help the novice user complete his SUCCESS™ estimate with as few errors as possible. Some of the items reported on this report are merely for information, and are not necessarily an indication that something is "wrong". Contact your EFD should you have questions.
- Report "G—End Item Report" exists to allow THE USER to perform Quality Control checking of his estimate. **DO NOT** submit this reports unless specifically requested by the EFD!
- Report "I—Spec Summary Report" provides a summary report patterned on CSI Specification Codes, 1 through 16. This report is independent of the estimate tree structure. Report is optional for Firm Fixed Price projects, but is **REQUIRED** for 8A (negotiated) contracts.
- Report "J—Labor Summary Report" provides a summary of all wage types used in the estimate. Labor types accumulate in this report for only those line items which have an entry in the RESOURCE cell of a detail line item, which in turn must include some type of labor. In the example at right, Crew "ACARCARP1", a crew resource assigned to a detail line item, has a labor resource of 1 carpenter.

	Code	Description	Cost	Rate	Labor
1	ACARCARP1	1 carpenter	14.57	14.57	
2	UFLDSPMG1	1 spare parts manager	0.00	0.00	
3	UFLDSPCL1	1 spare parts clerk	0.00	0.00	

	Resource	Labor Hours	Daily output	Labor
1		0.000	0.0000	0.00
2	ACARCARP1	1.495	0.6688	21.79
3	UFLDSPMG1	172.414	0.0058	0.00
4	UFLDSPCL1	172.414	0.0058	0.00
5	UFLDSPCL1	172.414	0.0058	0.00

- Report “K—Hard Copy Pricing Database” is meant to produce a hard copy of the CUPB database (English or Metric). It should be used with caution as it will take approximately 45 minutes to print on a Pentium 400, and use 550 sheets. To use:
 - Open the CUPB
 - Drag/copy the root level of the database to a BLANK *.pws
 - Close the CUPB
 - Choose “Expand All”
 - From the toolbar, select “Edit--Replace”.
 - On the General Tab, enter “Equal” for Comparison, “0.00” for Value, and “1.00” for Replace with.
 - On the Scope Tab, select “Detail item assignments”, and check “Quantity”
 - On the Replace Options Tab, use the default (“Replace Information Found.....”)
 - On the Results Tab, use the default “No List”
 - Click on “Replace All”
 - Use “Tools—Import” to import the 4.0 Navy Properties
 - Recalculate the copied database
 - Select report “K”, and print
- Report “L—CSI Detail Report” is the detailed companion to Report I. Much more detailed than the Spec Summary, it is an optional report unless the project is to be negotiated or is requested by the EFD.
- Report “M—Resources Summary Report” provides a listing of the “resources”(labor and equipment) used in the estimate, typically listed by crew. Report submittal is considered optional at EFD discretion.
- Report “N—Project Line Item Total Report” summarizes all occurrences of each unique Detail Line Item Code and ranks it, from high to low, with all other unique line items. Similar to 80/20 estimate review.

ADDING NOTES TO THE ESTIMATE

- To add notes to a level, highlight the desired tree level in the tree viewer, and open the “Notes” viewer in the secondary viewer. Type in the note, Click on the “Save” icon, and close.
- To add notes to a line item, highlight the desired line item in the Detail item assignments or Detail item viewer, open the “Notes” viewer, and type in your note. Click on the “Save” icon, and close. OPTION: Create a new (blank) line item in the Detail item assignments viewer, type “NOTE” in the CODE field for that line, and type your note into the Description field. This note will always appear with the Detail item assignments, and is therefore more conspicuous for review purposes.

IMPORTING AN ESTIMATE FROM SUCCESS™ 3.X INTO SUCCESS™ 4.X

- Estimates created in version 3.x no longer need to be imported. Open as you would any other estimate.
- Project properties for 4.x projects are different than those for 3.x projects, and your project **WILL NOT PRINT** until you provide the converted estimate with the proper properties. To do this, follow these steps:
 - Open a (WbsEnglishNorfolkRates or WbsMetricNorfolkRates) template.
 - Delete the template tree.
 - Drag your estimate into the blank template tree viewer.
 - Close your converted estimate, and save your “new” project.

Alternate method:

- Open a “Blank” template
- Drag your estimate into the blank template tree viewer.
- Close your converted estimate.
- Open “Tools—Import”, and select “4.x Navy Properties.dbf”.
- Save your “new” estimate.

IMPORTANT NOTES

- Creating user line items is best done by starting with a similar line item from the database. The CSI reports, the Labor report, and the Resources report all depend upon specific information to provide a meaningful report. It is important to have a line item code which begins with AT LEAST 3 numbers which match the CUPB version of a CSI code for the line item to be sorted by the CSI reports. It is also important that a user line item have a “resource” (labor type, equipment type, or crew) so that Hours are accumulated for the Resource and Labor reports.
- COMPRESSING PROJECTS as a standard option inside Success was dropped due to problems with the process. For Outlook users, however, it is still possible to compress the estimate into a single file with a *.pwz extension. To compress an estimate or to attach the estimate to an Email, choose “File—Send”, and follow the directions. The estimate will be “zipped” for you automatically. Email the estimate to yourself, and save the compressed attachment.
- The CUPB contains a unit price category, titled “**Unit Cost (Sub Quote)**”. Pricing appearing in this column of the database is a burdened, Subcontract level price, including all labor and equipment unless otherwise indicated. Care should be exercised in using these prices.

Point of Contact:

**ATLANTIC DIVISION, NAVAL FACILITIES ENGINEERING COMMAND
ENGINEERING AND DESIGN DIVISION
CODE CI47 (COST AND VALUE ENGINEERING)
NORFOLK, VIRGINIA**